



## NEWS RELEASE

# DFIN Client Successfully Live-Files New Tailored Shareholder Reports with SEC through ArcReporting

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DFIN's ArcReporting® Streamlines Preparation, iXBRL Tagging, and Filing Process for Large Asset Management Company

CHICAGO, Aug. 1, 2024 /PRNewswire/ -- **DFIN** (NYSE: DFIN), a leading risk and compliance company, today announced that a large Los Angeles-based asset manager used its proprietary SaaS solution, **ArcReporting®**, to successfully create, iXBRL-tag, and live-file a Tailored Shareholder Report (TSR) on Form N-CSR in compliance with the SEC's new **TSR rule**.

We've adapted to the TSR rule, simplifying a complex process and instilling confidence in our clients and their filings.	The SEC adopted the TSR rule to simplify and standardize shareholder communications, highlighting key information specifically for retail investors. This live filing further demonstrates DFIN's commitment to customer success and continuous product innovation.
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"Delivering innovative solutions that help our clients simplify operations and stay ahead of the rapidly evolving regulatory landscape is in DFIN's DNA," said Eric Johnson, President of Global Investment Companies at DFIN.

DFIN is the largest SEC EDGAR filer by number of filings annually, with nearly 40% of investment company filings on an annual basis. Similarly, DFIN leads the market in iXBRL tagging and filing.

"DFIN's enhanced ArcReporting solution empowers our clients to create, assemble, validate, and transmit their N-CSR filings directly from the application – all with a streamlined dashboard view," said Floyd Strimling, Chief Product Officer at DFIN. "In the course of a year, we've adapted to the new TSR rule, simplifying a complex process and instilling confidence in our clients and their filings."

ArcReporting is part of **DFIN's Arc Suite®**, a robust platform designed to boost productivity, mitigate risk, and

enable end-to-end, straight-through processing. Learn more about ArcReporting and TSR here: [dfinsolutions.com/solutions/tailored-shareholder-reports](https://dfinsolutions.com/solutions/tailored-shareholder-reports).

## About DFIN

**DFIN** is a leading global provider of innovative software and technology-enabled financial regulatory and compliance solutions. We provide domain expertise, enterprise software, and data analytics for every stage of our customers' business and investment lifecycles. Markets fluctuate, regulations evolve, technology advances, and through it all, DFIN delivers confidence with the right solutions in moments that matter. Learn about DFIN's end-to-end risk and compliance solutions online at [DFINSolutions.com](https://DFINSolutions.com), or you can also follow us on X (formerly Twitter) [@DFINSolutions](#) or [LinkedIn](#).

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